

A Work Project, presented as part of the requirements for the Award of a Masters Degree in Management from the NOVA - School of Business and Economics.

"Managing the impact of tourism in historic urban destinations. A sustainability approach: Case study of Sintra"

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Abstract

In this Work Project, it will be assessed how Sintra's sustainability is affected by the consequences of the visitor flow on its urban historical center. Two research questions will support this case study: What is the main problem affecting Sintra as a tourism destination? How sustainable will Sintra be in the next 10-15 years? The main findings suggest Sintra faces an intense seasonal pressure on its historical city center and its sustainability might be seriously affected in the near future, whereby three domains of the destination deserve a serious strategy reassessment: promotion, management, and supply.

Key-words: Tourism Impacts; Sintra; Seasonality; Sustainability

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1. Introduction

Since the 1950's, tourism has assumed larger and larger proportions worldwide, mainly due to the openness and investment countries have had towards it, enabling the creation of a very dynamic industry capable of generating a greater development, prosperity and well-being for the agents involved (WTO, 2014). In fact, WTO (2014) points out that worldwide tourism represents 9% of global GDP (direct, indirect and induced impact), one in eleven jobs are included within this area, and 6% of the world's exports belong to tourism.

Portugal was no exception in what regards to the importance tourism had for the country's economy. In 2014, more than 10,3 billion euros were generated in tourism receipts from the more than 16 million tourists in the country (Turismo de Portugal, 2015). However, tourism impacts go well beyond these numbers. If tourism development is not carefully managed, the sustainability of tourism destinations might be seriously compromised in the near future.

In what respects to the main goal of this Work Project, it will be assessed how sustainable Sintra is as an urban cultural destination which annually attracts a high number of seasonal visitors. In order to do so, two research questions will constitute the basis for it:

- 1) What is the main problem affecting Sintra as a tourism destination?
- 2) How sustainable will Sintra be in the next 10-15 years?

The structure of this Work Project is composed by 4 parts. In Chapter 1, a brief Literature Review will cover the following topics: Tourism Impacts, Tourism Seasonality and

Sustainable Tourism. Regarding Chapter 2, it will be presented the case study of Sintra. Firstly the destination will be framed in the context of Lisbon; secondly it will be presented the current trends characterizing Sintra as a tourism destination; thirdly, it will be assessed the current stage of the destination's development; and finally, it will be made an estimation about the number of future visitors for 15 years.

In Chapter 3, it will be assessed Sintra's sustainability based on a set of indicators for the purpose. And lastly, in Chapter 4, recommendations will be made in order to prevent and mitigate the problems evidenced in Sintra.

2. Literature Review

According to WTO (2008), "tourism is a social, cultural and economic phenomenon related to the movement of people to places outside their usual place of residence, pleasure being the usual motivation."

Theobald (2004) suggests that there are two main groups affected by the benefits and drawbacks of tourism: the visitors and the resident population of the host region.

2.1. Impacts

Tourism might generate extremely positive outcomes, if well managed, or lead to very severe consequences, if not properly managed (UNEP, 2005). Matheson A. and Wall G. (1982) noted that tourism impacts would involve three main areas: sociocultural, economic and environmental.

In what regards to sociocultural impacts, the conservation of local heritage and the mix between host communities and visitors – leading to improve lifestyles and practices (Demonstration Effect), are examples of positive outcomes. On the other hand, tourism might also cause a change or loss of identity and values in some destinations in order to satisfy tourism demands (UNEP, 2005).

The Economic impact is perhaps the most important impact for host communities since it provides the opportunity to increase employment (Inskeep, 1991) and generates revenue at many levels, either internationally, nationally or even locally (Cooper et al., 1993). However, UNEP (2005) suggests infrastructure costs, increase on prices and economic dependence on tourism might arise as negative economic impacts from tourism.

Environmentally, although tourism might foment the investment on protection and preservation of natural resources (UNEP, 2005), Genot (1997) and Wong (2002) state pressure on natural resources, harm to wildlife, biodiversity loss, and pollution are the negative side of a careless tourist development.

2.2. Tourism Seasonality

Butler (1994,) defines Seasonality as *“the temporal imbalance in the phenomenon of tourism, which may be expressed in terms of dimensions of such elements as numbers of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment and admissions to attractions”*.

Researchers have suggested that seasonality’s main causes arise from two groups: natural and institutional (BarOn, 1975; Commons and Page, 2001). The first group comprises

factors beyond decision-making control such as weather and climate (Commons and Page, 2001). The second one is the result of human decisions, involving holidays, public events or tastes and motivations (Butler, 1994; Goulding, Baum & Morrison, 2004).

Regarding seasonality impacts, Butler (1994) claims that the overall perception of the literature identifies seasonality as a problem for tourism, although additional income from seasonal work or environmental resources' post-season recovery are suggested to be benefits from it (Krakover, 2000; Witt and Moutinho, 1995).

2.3. Sustainable Tourism (ST)

Researchers have attempted to define ST (Travis, 1994; Thibal, 1997; Middleton and Hawkins, 1998), and even though there exist some different approaches for the concept, ST might be described as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (WTO, 2005).

The main concern around this issue has lied on its practical application (Hardy et al. 2002; Dewhurst and Thomas, 2003), especially on some stakeholder-related areas that were not properly addressed (Dodds, 2007; Hardy and Beeton, 2001). However, as an attempt to make the assessment of sustainability clearer, the European Commission (2013) developed the European Tourism Indicator System (ETIS), consisting on a set of indicators which enables every tourist destination to monitor and improve its sustainability (European Commission, 2013).

3. The case study of Sintra

In this chapter, a brief description of the current tourism trends in the region of Lisbon will be made, considering the most important municipalities within the region – (1) Lisbon (the city); (2) Cascais and Estoril; (3) Sintra. In what regards to Sintra, there will be firstly made a brief overview of the current tourism dynamics, followed by the identification of destination's development stage. Finally, an approach of the future forecasts concerning its visitors' growth will be shortly presented, so that it is possible to have a full picture of the destination's development.

3.1. Tourism in the region of Lisbon



Source: Roland Berger, 2014

Lisbon has achieved a solid position in what concerns to tourism growth in the last years, becoming a well-established reference among international destinations. Over the last six years, Lisbon registered a significant increase both on the total number of tourists and on the number of nights spent by them, especially due to the foreigners' contribute. On Table 1, it is possible to verify that in 2009, 3.635.079 guests, from which 2.247.773 were foreigners and 1.387.306 Portuguese, stayed in Lisbon for 7.905.937 nights¹ (See Table

¹ The number of nights results from the following calculation: number of guests in 2009* average length of stay

2). Until 2014, the number of tourists and consequent nights spent by them increased, reaching its maximum in 2014, when 4.913.411 tourists – foreigners accounting for 3.341.777 and nationals for 1.571.634 – spent 11.558.124 nights in the destination.

In what regards to the average duration of stay per visitor, there was a smooth increase in the same period from 2,2 nights to 2,4 nights (Table 2). In addition, it matters to point out that, over the period considered, the hotel occupation rate increased more than 10%. Spain, France, Brazil, Germany and United Kingdom were the countries who sent a higher number of tourists to Lisbon (Turismo Portugal, 2014).

Table 1: Number of tourists in the region of Lisbon

	2009	2010	2011	2012	2013	2014
Total Foreigners	2.247.773	2.445.411	2.576.044	2.705.584	2.924.839	3.341.777
Total Portuguese	1.387.306	1.494.903	1.449.228	1.410.248	1.393.899	1.571.634
Total Global	3.635.079	3.940.314	4.025.272	4.115.832	4.318.738	4.913.411

Source: The author, with data from INE and Turismo de Portugal

Table 2: Number of nights spent by tourists in the region of Lisbon / Average stay per guest

2009	2010	2011	2012	2013	2014
7.905.937 / 2,2	8.620.423 / 2,2	9.027.432 / 2,3	9.439.853 / 2,3	10.040.808 / 2,3	11.558.124 / 2,4

Source: The author, with data from INE and Turismo de Portugal

The region of Lisbon presents a very diverse scope of attractive areas according to each tourist preferences, whereby it is relevant to divide Lisbon in two parts: the city and the region. The first one considers Lisbon at a micro level, while the second one considers Lisbon in a larger perspective, in which two areas must be approached: Cascais and Estoril, and Sintra.

The city of Lisbon was responsible for 72% of the nights spent by tourists in the whole region, in 2013, centralizing a great part of the tourism activity in this area (INE, 2014).

Between 2009 and 2013, the city itself increased 7% in what regards to the number of nights spent by tourists (Roland Berger, 2014). The city has a very strong and diverse supply for tourists, enabling to offer in its micro-centralities (See appendix 1) cultural attractions, gastronomy, nautical sports, shopping, nightlife, cruise ships infrastructure, Meetings Industry (MI)², and a good range of festivals events.

Concerning Cascais and Estoril, it matters to mention that tourists might enjoy a range of diversified and high-quality opportunities. Taking advantage of the proximity to the city of Lisbon, the destination was able to be the second area with higher importance in the region, accounting for 13% on the number of nights spent by tourists in 2013, having a growth of 7% of between 2009 and 2013 (Roland Berger, 2014). Additionally, the destination is focused on a premium segment of tourists who can take benefit of a diversified supply: sea/beach, culture, nautical sports, MI, events, golf, nature and gastronomy (Roland Berger, 2014).

Sintra arises as another highly demanded area within the region of Lisbon. Considered as a cultural landscape by the World Heritage Center (UNESCO, 2015), this area has been increasingly visited by tourists. Indeed, Sintra is “a unique example of the cultural occupation of a specific location that has maintained its essential integrity as the representation of diverse successive cultures” (UNESCO, 2015). Besides culture, Sintra also has a significant portfolio to offer to its visitors such as nature, golf, gastronomy, enology or even its beaches. In what regards to the number of nights spent by tourists in 2013, the area accounted for 3% of the total in the region of Lisbon, considering the fact

² MI – The Meetings Industry “consists of a broad range of organizers, suppliers and facilities engaged in the development and delivery of meetings, conferences, exhibitions and other related events which are held in order to achieve a range of professional, business, cultural or academic objectives.”

that more than 35% of tourists in the city of Lisbon visited this destination (Roland Berger, 2014).

3.2. Sintra as an urban cultural destination

In this section, an assessment of the visitors of Sintra will be made by analyzing their evolution in the area, as well as a brief description of their profile. Understanding how many they are, who they are, and when they visit the destination, might reveal important information to subsequently address the main problems of the destination.

Sintra's visitors need to be carefully analyzed taking into account two subgroups – excursionists and tourists. Excursionists are those who perceive Sintra as a “one-day trip destination” and come mainly from Lisbon and Cascais, their accommodating areas (Roland Berger, 2014). Tourists are those who effectively spend the night in Sintra.

In Table 3, it is possible to observe the number of visitors in Sintra's main attractions – monuments, museums, municipal gallery and other places, in 2013 and 2014. In 2013, a total of 2.162.522 tourists visited Sintra, 903.930 in the first semester and 1.257.592 in the second one.

Table 3: Number of visitors in the main attractions in Sintra

	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec	Total
2013	68634	86671	139112	189831	220488	200194	272088	337338	246303	186837	111370	103656	2162522
2014	77000	88957	147403	230701	256842	233293	297771	388921	271819	223797	123874	121941	2462319

Source: The author, with data from Câmara.Municipal de.Sintra (C.M.Sintra)

In what regards to 2014, it is relevant to mention the increase of 13.9% in the number of visitors compared to the previous year, reaching 2.462.319 in the whole year - 1.034.196 in the first semester and 1.428.123 in the second one, respectively.

On the other hand, it is relevant to consider Table 4 which included the number of tourists in Sintra between 2012 and 2014. It is possible to observe a growth in the number of tourists in the period considered, being 124.610 in 2012, increasing to 136.498 in 2013 (growth of 9.5%), and finally to 160.522 in 2014 (growth of 17.6%). However, the average number of nights per guest slightly decreased in the period considered.

Table 4: Number of tourists in Sintra

	2012	2013	2014
Number of Guests	124.610	136.498	160.522
Number of Nights	264.989	289.850	333.494
Average Number of nights	2,127	2,123	2,078
Percentage of tourists relative to total visitors	No data available	6,3%	6,5%

Source: The author, with data from C.M.Sintra

It is important to add that, over the period considered, the majority of the guests were Portuguese, but spent less nights – around 1,7 nights – than the total average. Spain, France, Germany and United Kingdom also compose the top-five countries which sent more guests to Sintra (See appendix 2).

Therefore, considering the previous statistics, there should be emphasized the main characteristics defining Sintra as an urban cultural destination, between 2012 and 2014:

- There was an increasing flow of visitors in Sintra, mainly composed by excursionists.
- During the period between April and October, there was a significant rise on the visitors flow, reaching its maximum in August.

- There was a significant difference between the total number of visitors in the main cultural attractions and the total number of tourists who choose Sintra as an accommodating area – 6,3% and 6,5% in 2013 and 2014 respectively – reinforcing the presence of an excursionist character in the visitors of Sintra.
- The flow of visitors in this region displayed an evident seasonal pattern, expressed not only in the summer time, with the higher number of visitors comparing to the other seasons, but also during the day time, when the number of visitors was considerably more significant comparing to the number of visitors who spent the night in Sintra.

At this point, it is already possible to frame the main problem characterizing the Historic Centre of Sintra: **the high flow of visitors at the peak season creates an intense pressure on the territory which inevitably originates impacts within the destination.** This problem raises even more concern if the geographical location of the main attractions in Sintra (see appendix 3) and the existent capacities of the accommodation establishments are taken into account. On the one hand, it is noticeable how small Sintra's historical center is to receive such a high number of visitors. On the other hand, the low bed capacity available at the accommodation establishments does not foment an incentive for visitors to stay accommodated in Sintra.

In Table 5, it is possible to see some of the main causes which lead to the problem currently affecting the Historical Center of Sintra, and some consequences originated by it.

Table 5: The causes for the seasonal overconcentration of visitors in Sintra, and its consequences

Main Causes	The Problem	Main Consequences
<ul style="list-style-type: none"> • The effect of Lisbon's proximity • World Heritage Site Status • Advertisement campaigns • Visitors word-of-mouth • International awards • Lack of accommodating infrastructure (applied to the whole municipality) 	Overconcentration of visitors during the peak season in a very small area.	<ul style="list-style-type: none"> • Overutilization of resources • Pressures on transport system and other infrastructure during peaks • Crowding and consequent locals' and tourists' dissatisfaction • Pollution and traffic • Higher prices during the peak season • Excursionists' average expenses are lower than tourists' ones

Source: The author

The main idea to extract from Table 5 is precisely the fact that the increasing number of visitors in Sintra – due to Lisbon's proximity, its own popularity and advertisement – and the lack of infrastructures to accommodate tourists lead to an overconcentration of visitors in a small area with a significant number of attractions, especially on the peak season. Therefore, negative impacts are generated, affecting Sintra's environment, local population, cultural heritage and economy.

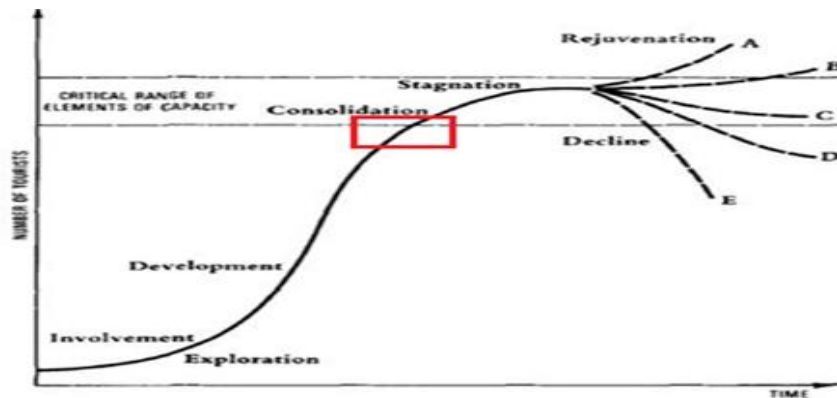
3.2.1. Sintra – Assessing the destination's stage of development

At this point, it is useful to try to identify in which stage Sintra is in right now, according to the main characteristics of Butler's Cycle of Area Evolution (See appendix 4). There will be used five of the characteristics which are commonly used to describe each stage on the model.

- Number of Visitors: It is very high at the peak season and acceptable at the off-peak season. The tendency is to increase in the short and medium run (See the following section).
- Advertising: It has been increasing over the years, creating a well-defined visitors' market, composed by excursionists mainly.
- Local Involvement and control of tourism development: As a consequence of the increase on the number of visitors, both local involvement and control of tourism development tend to decrease, especially during the most crowded months.
- Natural and Cultural attractions developed and marketed: Having its inscription on UNESCO World Heritage List acts not only as an way to attract visitors but also creates an additional pressure on the destination to be properly managed and to meet the criteria required by UNESCO. As a result, Sintra Natural and Cultural attractions have been developed and highly marketed.
- Investment in tourist facilities and infrastructures: Low, especially considering the number of accommodating establishments for tourists.

Considering the previous characteristics and the description of each stage (appendix 4) of the model, it is plausible to assume Sintra is going through a point between the end of the Development Stage and the beginning of Consolidation Stage, as it is shown in Graph I (red area).

Graph 1 – Sintra's Area Life Cycle



Source: Adapted from Butler's Tourism Area Life Cycle

One of the key facts for this assumption lies on WTO's definition (1981) of tourism carrying capacity: *"the maximum number of people that may visit a tourist destination at the same time, without causing destruction of the physical, economic and socio-cultural environment and an unacceptable decrease in the quality of visitors' satisfaction"*.

According the previous definition, being one of the four domains – physical, economic, socio-cultural, and quality of visitors' satisfaction – affected by the number of visitors, it might be stated that tourism carrying capacity levels are reached. In Sintra's case, as it is possible to see on Table 5, there are indeed factors that already affect the four domains at the peak-season, due to the overconcentration of visitors, making it to surpass its critical range of elements of capacity.

However, the off-peak season still presents a positive scenario in what tourism carrying capacity concerns, and considering the lack of investment in tourist facilities and infrastructures to retain tourists, it wouldn't be reasonable to consider a potential late stage of Consolidation or even the beginning of Stagnation as the stage Sintra is in. As a

result, the area in red illustrated in the previous graph seems to address plausibility when balancing both peak and off-peak seasons.

3.2.2. Sintra as an urban cultural destination in the future

According to WTO (2014), worldwide arrivals will grow by 3.5% through 2025, although in Southern and Mediterranean Europe, the growth is estimated to be 1.8%. In what regards to Lisbon, it is expected that the number of visitors in the region increases by 4,5% until 2020 (Roland Berger, 2014). Considering those forecasts, and knowing that Sintra's visitors come mainly from Lisbon, it would be relevant to predict to what extent Sintra will be affected by the expected increasing number of tourists in the capital in the following 15 years.

In order to do so, it is necessary to run a correlation between the number of tourists in the region of Lisbon and the number of visitors in Sintra (Table 6). For that effect, it is considered the period between 2005 and 2014. By obtaining a $r=0.8069$, it is possible to conclude that there is a strong correlation³ between the number of tourists and the number of visitors in Sintra, meaning if an increase on the number of tourists in Lisbon occurs, so it happens with the number of visitors in Sintra.

Table 6: Correlation between the number of tourists in the region of Lisbon and the number of visitors in Sintra

Year	Number of tourists in Lisbon	Number of Visitors in Sintra ⁴	Correlation coefficient (r)
2005	2006165	597156	0,806915053
2006	2205018	649791	
2007	2387595	778589	

³According to Dancey and Reidy's (2004) categorization

⁴From 2005 to 2012, the number of visitors in Sintra only includes the statistics from "Parques de Sintra - Monte da Lua"

2008	2380066	860520
2009	3635079	887025
2010	3940314	967600
2011	4025272	1068261
2012	4115832	1293876
2013	4318738	2162522
2014	4880000	2462319

Source: The author, with data from Turismo de Portugal and C.M.Sintra

Therefore, considering the period between 2014 and 2030 will be based on moderate growth (see appendix 5 with each scenario explanation), it could be predicted a substantial increase on the number of visitors in Sintra, from the 2.462.319 recorded in 2014 to more than 5.000.000 expected for 2030.

Table 7: Forecasts for the number of visitors in Sintra until 2030

Year	Moderate Growth
2014	2.462.319
2015	2.585.435
2016	2.714.707
2017	2.850.442
2018	2.992.964
2019	3.142.612
2020	3.299.743
2021	3.464.730
2022	3.637.967
2023	3.819.865
2024	4.010.858
2025	4.211.401
2026	4.421.971
2027	4.643.070
2028	4.875.223
2029	5.118.984
2030	5.374.934

Source: The author, with data from C.M.Sintra

So, as a final remark regarding this chapter, it is crucial to point out that, considering Sintra's current stage of development and the forecasts for the number of its visitors, and

if there is no major change to accommodate such growth, the sustainability of the destination could be seriously affected, leading the destination to lose its attractiveness.

4. Sintra as a sustainable destination

In this section, it will be made an assessment of Sintra's sustainability for the next 10-15 years. In order to do so, an adaptation of the European Tourism Indicator System (ETIS)⁵ Toolkit, prepared by the European Commission (2013), will be used as a supporting instrument for the respective procedure. By providing flexibility and autonomy, ETIS toolkit enables the user to track the destination performance and improve the decision-making process concerning sustainability, whereby it is chosen as the basis for the following process.

The ETIS toolkit was designed as a tool to help tourism destinations to better monitor, manage, and improve their sustainability. Its system is based on four main categories: Destination Management, Economic Value, Social and Cultural Impact, and Environmental Impact. Each category has different criteria. Consequently, to each criteria belongs a different set of indicators, which can assume a higher importance – the core ones – or a lower importance – the optional ones. The first group is composed by 27 indicators, while the second one comprises 40 indicators.

Hereupon, it will be given an explanation of the steps taken to build the assessment model of Sintra's sustainability.

⁵ See here its full version: http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents_indicators/eu_toolkit_indicators_en.pdf - pages 20-24

1- Choosing the indicators: The indicators' selection process is based on the following aspects: a) to choose from each of the four categories; b) to prioritize the core indicators; c) to prioritize the indicators which are most related with the visitor flow; d) to be able to find available data on the topic. After these considerations, 18 indicators were chosen. (In appendix 6, it is presented the importance of each of the indicators selected for this model).

2- Data Collection: After having the indicators defined, it is necessary to collect the data for each of them. This process assumes two possibilities: a) data must be readily available and directly collected from the respective sources (as suggested by the ETIS toolkit); b) If data is not directly available, it must be followed the calculation method officially suggested for each indicator, being applied to indicators 4 and 12 from table 8 (appendices 6 – for the calculation process, and 7 – with the calculation of the indicators respectively).

3- Suggesting Targets

After having the data, it is essential to compare Sintra's results with targets, so that it is possible to evaluate the destination level of sustainability. Ideally, these targets should be based on future sustainability forecasts for each indicator. However, given the data unavailability for the majority of the indicators and the flexibility of the Toolkit, the following options will be proposed: a) To set a unique target based on Portugal's average obtained from an accredited entity; b) If a) is not possible, such target will be based on an international standard, from an accredited entity. c) If neither of the previous options is

possible, it will be used information collected during the interviews⁶. Apart from this, there are two indicators that won't fit in this process, given its closed-ended format.

Table 8 – Sustainability in Sintra

Number	Indicator	Unit of Measure	Comparative Target	Sintra Results	Source
Destination Management					
1	Destination with a sustainable tourism strategy/action plan	Yes/No	-	Yes	C.M.Sintra
2	Percentage of tourism enterprises/establishments in the destination using a voluntary verified certification/labelling for environmental/sustainability and/or CSR measures	%	32	13	INE (2013)
3	Percentage of visitors that are satisfied with their overall experience in the destination	%	92	91	Turismo de Portugal; C.M.Sintra (2013)
Economic Value					
4	Number of tourist nights per month	%	32.439 ⁷	27.791	C.M.Sintra INE (2014)
5	Number of 'same day' visitors in high season ⁸ and low season	%	39,8	39	C.M.Sintra INE (2013)
6	Daily spending per same day visitor	€	77,17	35	EU (2014) Local Interview
7	Daily spending per tourist (accommodation, food and drinks, other services)	€	104,23	175	INE (2014) Local Inter.
8	Average length of stay of tourists	# of nights	2.9	2.1	INE (2014)
9	Occupancy rate in commercial accommodation (average for the year)	%	39,7	42,3	INE (2014)
10	Average price per room in the destination	€	43,24	46,08	A.H.P (2014)
11	Direct tourism employment as percentage of total employment	%	8	6,4	INE C.M.Sintra (2011)
Social and Cultural Impact					

⁶ Interviews made for the last chapter purpose with two local hotel managers

⁷ This value is relative to Cascais

⁸ High Season is considered to be from July to September

12	Number of tourists/visitors per 100 residents	# of tourists/visitors	T: 446 ⁹ V: Not av.	T: 33,1 V:242	EU
13	Destination covered by a policy or plan that protects cultural heritage	Yes/No	-	Yes	C.M.Sintra
Environmental Impact					
14	Percentage of tourists and same day visitors using different modes of transport to arrive at the destination (public/private)	%	39: Pub.	59: Pub.	C.M.Sintra E.E.A
15	Waste volume produced by destination	kg	440	397	INE (2014)
16	Fresh water consumption per tourist night compared to general population water consumption per person night	L	175 / Tourist: Not available	161 / Tourist: Not Available	INE (2011) C.M.Sintra (2011)
17	Energy consumption per tourist night compared to general population energy consumption per person night	kWh	1227 / Tourist: Not available	1037 / Tourist: Not available	INE (2014)
18	Percentage of destination (area in km ²) that is designated for protection	%	22	25	A.P.A. C.M.Sintra (2014)

Source: The author, with data from the sources seen above

After comparing the indicators with the targets, it is important to mention the main findings:

- Destination Management: Sintra results show a negative scenario on the tourism establishments' certification – 13% comparing to 32% in Portugal – what might indicate either a lack of sustainable concern from these stakeholders, or a lack of financial capacity to engage on “green” investments. On the other hand, the existence of a sustainable plan for the area might indicate that authorities perceive sustainability as a path to be followed on the tourist context.

⁹ Not available for Portugal. It is relative to European Union

- **Economic Value:** Sintra denotes a negative scenario on the amount expended by one-day visitors (excursionists), spending in average approximately less 40€ than the average same-day visitor in Portugal. In addition, the length of stay of tourists is inferior almost in one night comparing to the average of Portugal. As positive considerations, it must be stated the higher occupancy rate in Sintra's commercial accommodation comparing with the country's average, and also the substantial difference of about 70€ on the daily amount spent by tourists relative to the average of Portugal. This might suggest that tourists in Sintra belong to a premium target market.
- **Social and Cultural Impact:** It must be highlighted the very large difference between the number of tourists per 100 residents, comparing with the European standard. While in Sintra there are 33 tourists per 100 residents, the European average is of 446 tourists per 100 residents. However, considering Sintra's number of visitors, the result is very different, with 242 visitors per 100 residents, which might be caused by the impact of excursionists.
- **Environmental Impact:** This area deserves a positive comment, given the results of Sintra comparing with Portugal. Nevertheless, it must be noted that the tourists' data unavailability, the resident population might not represent a robust sample compared with the country's average, especially since the whole municipality of Sintra was included in the results.

5. Recommendations

Overall, attending to the previous results, it would be plausible to contemplate the hypothesis of Sintra to become an unsustainable tourist destination in 10-15 years, especially considering the expected growth on the number of visitors and the high flow

of visitors already seen at the peak season, although it could be useful to go further on the research of local population perception regarding tourism. Therefore, in the current chapter, some suggestions will be proposed in order to mitigate the current impacts resulting from the excessive number of visitors during the peak season. In order to do so, the main supporting sources will be: (1) interviews made to hotel managers in Sintra (see appendix 8); (2) a benchmarking study considering other cities facing similar problems (appendix 9); (3) the main findings from the previous chapter. These will be sub-divided into three categories of intervention: (1) promotion/advertisement; (2) destination management; (3) supply.

Promotion/advertisement

It seems relevant to rethink the strategy at the destination level in order to better capture the tourists' attention that Sintra is also a destination to stay accommodated in. According to one of the interviewed hotel managers, "Sintra's problem is not on its brand. The brand is strong. The real problem arises from the promotion". Therefore, considering this area, the following aspects will be recommended:

- **To create a more autonomous and powerful department/center specialized on the advertisement of the destination.** Sintra's advertisement highly depends on broad entities, such as Turismo de Portugal and Associação de Turismo de Lisboa. Consequently, Sintra ends up not being given enough credit as a place to attract tourists itself. Sintra is instead advertised as an attachment of Lisbon, or even as a part of Cascais/Estoril. Thus, this recommendation arises in order to give Sintra more autonomy within the region of Lisbon.

- **It is necessary to be present in touristic fairs/events/exhibitions.** As a way to clearly point out Sintra as a differentiated place relative to the city of Lisbon, these events, especially at an international level, must be considered as an important catalyst to bring new tourists to Sintra. The presence in these events might assume a greater importance next to Northern-Europeans or North-American public, “since these tourists usually end up spending a higher amount of money in the destination of Sintra”, as it was mentioned by Paulo
- **Improve the online information available for visitors** offered by C.M.Sintra. Currently, there are three main sites created by the institution to provide a better experience for visitors: one is focused on Sintra’s historical center (“Sintra Romântica”), other targets Sintra as the whole region (“ActiveSintra”), and finally one is directed to the accommodation in the region of Sintra (“Sintra INN”). One simple measure to provide information for the visitors would be to merge the mentioned three platforms into one. Not only would provide more convenience for the user, but, above all, it would also direct the online traffic currently divided among the three, into one stronger platform.

Destination Management

Visitors find in Sintra a destination with a poor information system, lacking directions and information about the attractions, according to the interviewed Rui Bernardes. Considering the historical center of Sintra, this issue raises even more preoccupation, not only due the fact that visitors are faced with a large number of attractions to visit, but also because the uncertainty of the visitors regarding the attractions they wish to visit, might generate obvious complications such as congestions on the flow of visitors at some points of the village. In order to face that problem, it is recommended that:

- At first, it would be useful **to create a map with different areas**, clustering the main attractions according to their geographical location. Identifying each area with a different color would provide an understandable idea for tourists regarding the attractions they would visit.
- Then, as a complementation, it would be relevant **to propose a path for visitors to follow**, creating an ordered flow of visitors in the area. Therefore, keeping in mind the areas with different colors, establishing a starting area, naturally motivated by its accessibility, followed by the others which are geographically closer, would potentially create a more structured flow of visitors, enabling to mitigate some problems resulting from the overcrowding and congestion at some points.

Supply

As it was already mentioned, the unbalance between the number of visitors also has to do with the lack of appropriate infrastructures to retain tourists. Having this said, Sintra could improve in the following aspect:

- **Creation of a dynamic area capable to retain visitors at night, focused on two pillars: nightlife and the commercial establishments:** One the one hand, it is important to develop an area with suitable attractions so that visitors have motivations to stay in Sintra. On the other hand, it is relevant to consider that shopping-oriented tourists are a potential target to take into account. Therefore, by aligning both the factors previously described – nightlife and shopping, Sintra could establish itself as a stronger destination, capable to attract tourists, who would certainly perceive the destination as a place where the tourist supply goes beyond the “one-day trip” current stereotype.

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7. Appendices

Appendix 1

The city of Lisbon – Micro-centralities



Source: Roland Berger 2014

Appendix 2

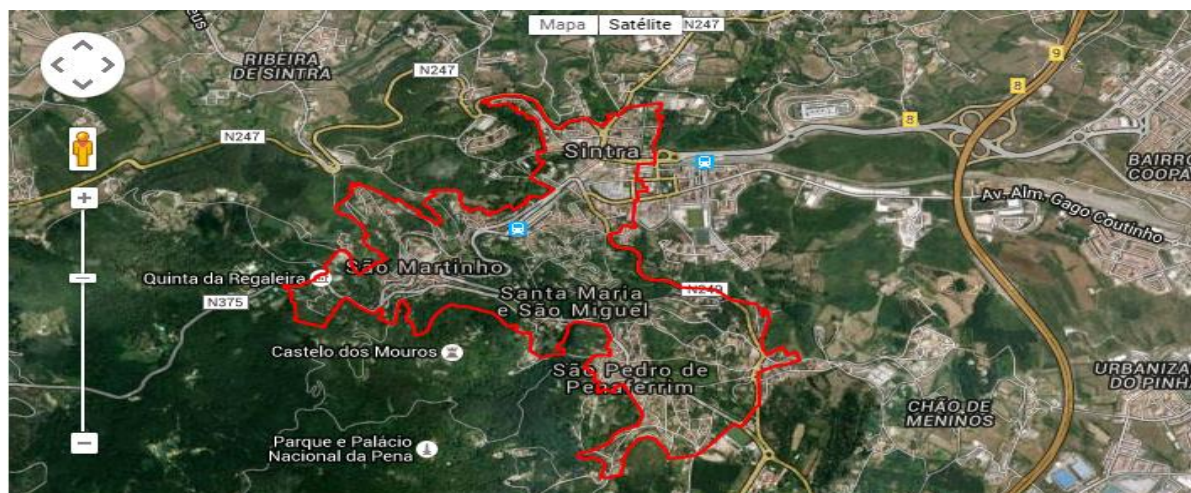
Top 5 countries which sent more guests to Sintra in 2013-2014

	Hóspedes	Dormidas	Hóspedes	Dormidas	MERCADO
Alemanha	4.497	12.201	5.639	12.658	0,04
Argentina	219	311	1.056	1.213	0,00
Austrália	786	973	1.699	2.237	0,01
Áustria	531	1.016	1.222	1.806	0,00
Bélgica	1.318	1.984	2.496	4.513	0,01
Brasil	3.527	5.194	4.376	6.924	0,03
Canadá	1.716	2.155	2.706	4.124	0,01
Dinamarca	533	1.316	1.263	2.261	0,00
Eslováquia	22	25	899	981	0,00
Espanha	13.213	31.744	14.367	31.197	0,11
E.U. América	4.248	8.020	5.087	9.398	0,04
Finlândia	549	2.058	1.216	1.825	0,00
França	6.954	14.304	10.001	19.201	0,06
Grécia	35	97	886	913	0,00
Holanda	2.714	8.188	3.137	7.599	0,02
Hungria	110	229	902	989	0,00
Irlanda	506	1.344	1.369	2.332	0,00
Itália	2.860	4.879	3.795	6.582	0,02
Japão	438	632	1.340	1.861	0,00
Luxemburgo	109	260	954	1.188	0,00
Marrocos	60	170	871	887	0,00
Noruega	679	2.591	1.858	2.814	0,01
Polónia	1.120	1.988	1.414	2.148	0,01
Portugal	55.738	89.467	51.697	88.172	0,48
Reino Unido	4.451	10.510	6.234	13.508	0,04
Rep. África do Sul	134	264	930	988	0,00
República Checa	123	274	937	1.059	0,00
Rússia	2.164	4.881	2.816	5.692	0,02
Suécia	624	1.759	1.500	2.546	0,01
Suíça	1.197	2.337	2.466	2.837	0,01
Venezuela	67	127	887	922	0,00
Outros	5.208	10.302	12.238	18.214	0,04
Total estrangeiros	60.712	132.133	96.561	171.417	
TOTAL GERAL	116.450	221.600	148.258	259.589	
<small>dados estimativa Penh</small>	<small>20 048</small>	<small>68 250</small>	<small>22 566</small>	<small>76 999</small>	

Source: C.M.Sintra

Appendix 3

Sintra's Historical Centre and its main attractions



Source: C.M.Sintra

Top 10 Attractions most visited in Sintra	2013	2014	Average
National Palace of Pena*	778427	888615	833521
Sintra Nacional Palace	393059	445491	419275
Quinta da Regaleira	285408	366173	325791
Moorish Castle*	274127	306613	290370
Queluz National Palace**	124490	132468	128479
Park and Palace of Monserrate	93207	93471	93339

Park of Pena	31428	46147	38788
Sintra Live Science Centre	46450	24896	35673
Convent of the Capuchos	33679	32850	33265
Sintra Toy Museum	31210	17061	24136
Total	2091485	2353785	2222635

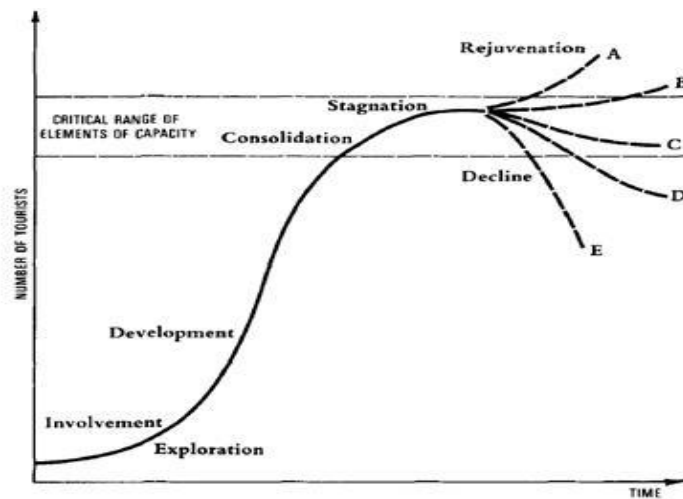
Source: The author, with data from C.M.Sintra

* Both attractions are outside the area in red, although they will be considered given their proximity

** The only attraction outside outside the area in the map

Appendix 4

Butler's Tourism Area Life Cycle and each of its stage's main characteristics



Tourism Area Life Cycle, R.W. Butler (1980)

Stage	Main Characteristics
Exploration	Low number of tourists attracted by natural/cultural tractions. The number of facilities and the contact with locals is low.
Involvement	The number of tourists increases moderately. Locals start becoming involved with tourists. Advertisement might be used to attract more tourists. Facilities might start to be offered to visitors
Development	The number of tourists increases very significantly, exceeding the number of locals in during peaks. A heavy advertisement will start attracting a well-define touristic market. Local involvement and control of tourism will decline. Some local facilities might disappear, being replaced by external organizations' secondary tourism attractions.
Consolidation	The number of tourists keeps increasing but at slower rates, exceeding the local population. The area's economy will be highly dependent on tourism. Marketing and advertising assume a wide-reaching role.

	Locals might have negative experiences with tourism.
Stagnation	The number of visitors reaches a peak, being tourism carrying capacity reached or exceeded. Negative impacts such as economic, environmental and sociocultural, might reach alarming proportions. Repeating visitors will be a very important source for the destination's survival. The destination still has a well-established image, but it won't be no longer fashionable.
At this point, more than one possibility might occur after the Stagnation stage. However, Decline and Rejuvenation are usually the most considered options.	
Decline	The destination will not be able to compete with newer attractions, being seen as a potential place for a one-day trip. Tourism facilities might be replaced by other activities.
Rejuvenation	An effective change in touristim attractions is essential. Investment in new facilities, reinvesting in existing resources and attracting new markets might mean a successful recovery of the destination.

Source: The author, adapted from Butler (1980)

Appendix 5

Forecast about Sintra's number of visitors in 15 years

Year	Slow Growth	Moderate Growth	Fast Growth
2014	2462319	2462319	2462319
2015	2585435	2585435	2708551
2016	2714707	2714707	2979406
2017	2850442	2850442	3277347
2018	2992964	2992964	3605081
2019	3142612	3142612	3965589
2020	3199179	3299743	4163869
2021	3256765	3464730	4372062
2022	3315386	3637967	4590665
2023	3375063	3819865	4820199
2024	3435814	4010858	5061209
2025	3497659	4211401	5314269
2026	3560617	4421971	5579982
2027	3624708	4643070	5858982
2028	3689953	4875223	6151931
2029	3756372	5118984	6459527
2030	3823987	5374934	6782504

Source: The author

This Table was made based on 3 scenarios: Slow Growth, Moderate Growth and Fast Growth.

The value of the year 2014 is the same for every scenario, based on the real value of the number of visitors recorded by C.M. Sintra. Additionally, every scenario will have two growth rates: one for 2014-2019; other for 2020-2030.

For slow growth: the growth rate used in the period between 2014 and 2019 was based on Roland Berger forecast for the increase on the number of tourists in Lisbon of 5%/year in the same period. So, this growth rate will be applied to the growth of visitors in Sintra in the same period. From 2020 until 2030, the growth rate will be used by assuming WTO's forecast for the growth on the number of arrivals for Southern and Mediterranean Europe, where Portugal is included in. Although WTO's forecast is only applicable until 2025, for a simplification purpose, it will be extended to 2030 in the table.

For moderate growth: for the period between 2014 and 2019, the method will be the same as in slow growth. Therefore a 5% of growth per year will be considered for the purpose of this analysis. For the period of 2020-2030 the growth rate will be also 5%, considering the number of tourists arrivals in Lisbon follows a steady pattern.

For fast growth: the growth used for the period between 2014 and 2019 will be considered to be 10%. As a result of the last 5 years' growth rate in the region of Lisbon of 6%/year (Roland Berger 2014) and especially the growth of 13,8% from 2013 to 2014 (Turismo de Portugal 2015), it will be assumed that tourists will surpass the average proposed on the other two scenarios. From 2020 to 2030, it will be assumed the growth of tourists decreases to a 5%/year growth rate, assuming a more balanced perspective.

Appendix 6

Destination Management			
Criteria	Indicator	Calculation	Relevance

Sustainable Tourism Public Policy	Percentage of the destination with a sustainable tourism strategy/action plan, with agreed monitoring, development control and evaluation arrangement	Total number of destination villages/towns with action plan ÷ total number of destination villages/towns * 100	Determining if the destination has a sustainable tourism policy and actionable plan, and if so, the completeness of it
Sustainable Tourism Management in Tourism Enterprises	Percentage of tourism enterprises/establishments in the destination using a voluntary verified certification/labelling for environmental/quality/sustainability and/or CSR measures	Total number of tourism enterprises certified ÷ total number of tourism enterprises * 100	Certification is an indication of industry interest and implementation of sustainable business practices
Customer Satisfaction	Percentage of visitors that are satisfied with their overall experience in the destination	Total number of visitors responding as satisfied with overall experience ÷ total number of visitor respondents * 100	The quality of the visitor experience affects the ability of the destination to generate economic benefits

Economic Value			
Criteria	Indicator	Calculation	Relevance
Tourism Flow (volume & value) at Destination	Number of tourist nights per month	Tally total number of tourist nights annually ÷ 12	Primary indicator of tourism volume in the destination, enabling to reveal seasonal patterns.
	Number of 'same day' visitors in high season and low season	Total number of same day visitors in the high season vs total number of same day visitors in the low season	"Same day visitors" are usually don't spend so much money relative to tourists and still the waste destination's resources
	Daily spending per same day visitor	Total annual spending by same day visitors ÷ total number of annual same day visitors ÷ 365	Understanding the economic impact of day visitors and compare it with tourists
	Daily spending per tourist (accommodation, food and drinks, other services)	Tally daily spending per tourist respondents (in total and by item) ÷ total number of respondents	Understanding the economic impact of tourists and compare it with same day visitors
Tourism Enterprise(s) Performance	Average length of stay of tourists (nights)	Tally the total tourist nights per respondent ÷ total number of respondents	Monitoring destination performance given that economic value of tourism multiplies as the length of visitor stay increases

	Occupancy rate in commercial accommodation per month and average for the year	Sum of monthly occupancy rates for the year \div 12	Measure the efficiency of accommodation stock utilisation.
	Average price per room in the destination	Tally average room rate for all available rooms throughout the destination. Result \div x Occupancy %	Reflects revenue the destination gains from accommodation and it can be compared to the occupancy rates
Quantity and Quality of Employment	Direct tourism employment as percentage of total employment	Total number of residents directly employed by tourism \div total size of destination labour force * 100	Understanding the role of tourism in job creation

Social and Cultural Impact			
Criteria	Indicator	Calculation	Relevance
Community/Social Impact	Number of tourists/visitors per 100 residents	Total number of tourists* average length of stay/total residents*365/100	Density of tourists/visitors in comparison to residents offers a suitable indicator for understanding the social impact of tourism on residents.
Protecting and Enhancing Cultural Heritage, Local Identity and Assets	Percentage of the destination covered by a policy or plan that protects cultural heritage	Total number of destination villages/towns with policy or plan \div total number of destination village/towns * 100	It is vital to protect and tangible and intangible expressions of heritage of the destination

Environmental Impact			
Criteria	Indicator	Calculation	Relevance
Reducing Transport Impact	Percentage of tourists and same day visitors using different modes of transport to arrive at the destination (public/private and type)	Total number of tourist and visitor respondents using public (private) transportation to arrive at the destination \div total number of tourist and visitor respondents * 100	Enables to understand if there is a need to increase the availability of sustainable transport options
Solid Waste Management	Waste volume produced by destination (tonnes per resident per year or per month)	Tally total volume of waste produced per month (annum) \div total number of residents	Keeping track of absolute volume is a means to assess the effectiveness of waste reduction initiatives.

Water Management	Fresh water consumption per tourist night compared to general population water consumption per person night	Total fresh water consumption related to general population (per year or per month) ÷ total number of residents; The same procedure for tourists	highlights the water footprint of the tourism sector and the need for conservation measures where needed
Energy Usage	Energy consumption per tourist night compared to general population energy consumption per person night	Apply a comparison between the energy consumption per tourist (night) and fresh energy consumption per resident as in the previous indicator	Important information for tourism development and planning, enabling enterprises to save money.
Landscape and Biodiversity Protection	Percentage of destination (area in km ²) that is designated for protection	Total geographic area (km ²) designated as protected within the destination ÷ total geographic area (km ²) of the destination * 100	It is important to know whether the destination demonstrates commitment to protection and recognises the significance of biodiversity.

Source: The author, with data from the ETIS toolkit

Appendix 7

Indicators from table 8 that needed calculation.

Indicator Number 4 - Number of tourist nights per month

	2012	2013	2014
Number of nights	264.989	289.850	333.494
Number of nights/month	22.082	24.154	27.791

Source: The author, with data from C.M.Sintra

Indicator Number 12

	Sintra	Historic Center*
Number of Residents	377 835	37219
Number of Tourists	160522	

Number of total visitors (Number of tourists + number of excursionists)	2.462.319	
Total (Tourists)	$160522 * 2,1 / 377835 * 365 / 100 = 3,3$	$160522 * 2,1 / 37219 * 365 / 100 = \mathbf{33,1}$
Total (daily, every visitor)	$2462319 * 1 / 377835 * 365 / 100 = 23,78$	$2462319 * 1 / 37219 * 365 / 100 = \mathbf{241,5}$

Source: The author, with data from C.M.Sintra

* São Pedro de Penaferrim + Santa Maria e São Miguel + São Martinho + Colares

Número turistas Lisboa Cascais/month

Appendix 8

Survey to Hotel Managers: Paulo R., from Sintra Boutique Hotel, and Rui Bernardes, from Hotel Nova Sintra

Survey to Hotel Managers

1- How do you evaluate the current tourism trend in Sintra? Are you satisfied with it (occupancy rate and prices)?

2- Which are, according to your opinion, the main positive and negative aspects of Sintra's tourism?

3- Do you believe the current flow of tourism is sustainable in 10 years (assuming there will be no significant changes in the current trend)?

4- How to deal with the higher seasonality during the summer period? How to better distribute tourists in different areas of Sintra?

5- What can be done to change the current excursionist-type of visitor to a tourist one (who spends the night in Sintra)? Do you believe Sintra will always be perceived as a one-day trip destination?

6- Do you believe there is an alignment between every stakeholder in Sintra in what regards to sustainable tourism? (Environmentally, economically, Sociocultural)

7- Is CMS supporting and developing enough activities to foment the demand of the right profile of tourists in Sintra? Don't you believe the current "Sintra – Capital do Romantismo" is, in terms of marketing, contributing for the increasing number of excursionists instead of more profitable ones?

8- Suggestions to attract more profitable niches of visitors and to cope with the current tourism flow.

Source: The author

Appendix 9

Benchmarking regarding cities with similar problems comparing to Sintra

City	Problem	Solutions
Segovia, Spain	Seasonality	<p>1st Plan: Aligning quality, excellence and sustainability.</p> <ul style="list-style-type: none"> - Cultural events, product diversification and to disclose its landscape uniqueness. <p>2nd Plan: Becoming competitive and sustainable: environmental, social and economic.</p> <ul style="list-style-type: none"> - Create a unique brand that is applied for every activity, seeking to renew classical products and create new cultural and exclusive products - Maintaining and capturing new targets: dividing them in regular cultural visitor, express visitor (day visitor), visitor who lives nearby and spends the night there and premium tourists. - Raise awareness of locals and leveraging private sector by focusing on internal communication, through the Municipal Tourism Office. - Creation of “Plus Observatory”: statistically studying the behavior of tourists and adapt to their changes.
Bruges, Belgium	<p>A significant increase on the number of visitors, especially day visitors, creating pressure on the city center. UNESCO’s inscription in 2000 and being Cultural Capital of Europe in 2002 were key events to boost tourism pressure within the city center. As a consequence of such growth, the following problems must be highlighted:</p> <ul style="list-style-type: none"> - A concentration of visitors on a small area (The old city) - Traffic congestion (mainly due to the easy access of private cars) - Locals’ life quality was affected by tourism growth 	<p>1st plan (1992): Focused on improving traffic problems within city center.</p> <ul style="list-style-type: none"> - Fomenting the use of environmentally transport modes like bicycle, banning vehicles in certain areas - Incentivize visitors to come in public transport instead of bringing private cars - Provide residents special access to local services <p>2nd Plan (2004): New traffic control plan to restrict tourism to the historic center and provide locals better life quality.</p> <ul style="list-style-type: none"> - “Park and ride scheme”. Visitors must park their cars at appropriate areas located outside the city center and take a free bus to get to the city center. - Offering package deals to repeat visitors, providing public transport to hotel guests. The targets are nationals and neighbouring countries, accounting for a large portion of staying tourists.

Venice	<p>The increase on the number of visitors, especially excursionists, is the biggest threat for the city. The unique natural and architectural characteristics of Venice make this destination one of the most popular worldwide. Some consequences arise from this touristic pressure, such as:</p> <ul style="list-style-type: none"> - Traffic congestion - Flooding and subsidence - Environmental Pollution 	<ul style="list-style-type: none"> - Large cruise liners were banned in the most important accesses on the centers. - A limit on the number of daily tourists was proposed. - Hotels and restaurants were encouraged to install biological water treatment but very few of them did it.

Source: The author, based on benchmarking research (Bibliography)